

The Ohio Board of Regents  
Unit-Record Tuition and Financial Aid Data Collection Consultation  
February 13, 2008  
Meeting Minutes

## **I. Welcome and Introductions**

### **In attendance:**

Greg Guzman, Bowling Green State University  
Conrad McRoberts, Bowling Green State University  
Eric Brown, Cleveland State University  
Marge Rozmarynowycz, Lorain County Community College  
Soni Williams, Ohio University  
Dana Pawlowicz, University of Cincinnati  
Barbara Bullock, Wright State University  
Jennifer Penick, Wright State University

Darrell Glenn, Ohio Board of Regents  
Katie Hensel, Ohio Board of Regents  
Bill Wagner, Ohio Board of Regents  
LeAnn Unverzagt, Ohio Board of Regents  
Vonetta Woods, Ohio Board of Regents

## **II. Financial aid data collection**

- It was asked how much the new specifications will resemble the pilot specifications.
  - Darrell Glenn noted that the new financial aid file will be very similar to that used in the pilot data collection.
- All of the identifying information in the file will be standard.
- Darrell does not want to collect duplicate data so data which can be retrieved from existing file submissions, a student's rank for example, may not be included in the financial aid file.
- Darrell is not sure if the "Campus" field should remain in the file because he is not sure if the data is broken out by campus or grouped by institution. He wants the data to reflect how institutions are billing students.
- A campus representative suggested keeping in mind that it is more difficult for institutions to aggregate data and report it than it is to gather the detailed data already collected and report it.
- In the second draft of the financial aid file, the "Grant/Loan" field was changed to "Gift/Loan" so that it is clear that scholarships are included. There were questions raised about what "Grant" entailed so the wording was changed to "Gift" to be more inclusive.
- A college representative asked about the inclusion of work study. Possibly, the "Gift/Loan" field can be expanded to include work study, "Gift/Loan/Work Study" or have a "W" flag for work study.
  - A campus representative noted that it is necessary to specify the type of work study, i.e. federal, because campuses have work study programs too.
  - LeAnn Unverzagt noted that per the pilot file's specifications, "W" could be a flag and the source would be "Federal".
- A campus representative noted that because there are many types and sources of funds, clear definitions are necessary to determine what data to report and how to report it.
- A campus representative asked if the Ohio Board of Regents could possibly develop guidelines to govern reporting, such as determining the ultimate source of the funds.

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- For example, if the funds came from the federal government but the state distributed them, would they be reported as federal or state?
    - Per the group, such dollars would be reported as federal.
- A campus representative noted that reporting veteran funding, BVR, 529, etc., may be tricky.
- The “Student Identifier Switch” field used in the pilot data collection indicates whether the identifier provided was a Social Security Number or not.
- The “Date of Birth” field in the pilot data collection was used to help distinguish students when other identifiable information, such as their Social Security Number, was not available or invalid.
- LeAnn noted that the pilot financial aid file had a switch for residents and non residents.
  - Since this data could be collected in the tuition and fees file, Darrell may not want to collect it in the financial aid file too.
- A campus representative recommended keeping the pilot data collection intact and not removing fields.
- A campus representative asked for further clarification about need based awards and how needy students are identified.
- A student can have multiple records in the financial aid file. If students have various types of awards, institutions should report each type of award individually although they may have the same exact information. Institutions can provide distinguishing information about the award in the comment section.
- Darrell noted that it is not too soon to for everyone to start thinking about the guidelines for the financial aid data collection.
  - Darrell will also further confer with LeAnn about the guidelines.
- The file will be reported annually but the awards and charges will be identified by separate terms.
- The new file collection will replace the October survey completed by institutions.
- Darrell foresees the due date for this collection to be late 2008 or early 2009 and would contain student data for the prior academic year.
- A campus representative asked the Regents to send out the data collection information to institutions who did not participate in the pilot so they will have an idea of what to collect and report.
  - LeAnn shared that the Regents try to give 6 months notice on new file collections and file changes.
- LeAnn thinks we can possibly have the file specifications laid out by April.
- A campus representative asked if campuses have already received the data from the pilot data collection. Darrell Glenn noted that he has provided information to the consultation group at past meetings but will need to follow up with campuses not participating in the consultation to see if they have the information.

**A. Third Party Reporting**

- There is currently interest in employer based awards which may have to be separately identified.
  - A campus representative noted that getting this information would be very difficult because some financial aid offices do not receive this information at all or at a much later time.
  - When dealing with a system of reimbursement, institutions do not really get information.

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- This information does not usually pass through the accounting system.
  - Accounts receivable sometimes handles this data.
- Katie Hensel noted that in previous surveys, institutions only reported what they knew although it was limited.
- Darrell is considering using “Other” instead of “Third Party” since employer information may be a small fraction of the third party information. Darrell does not want to specify this field as employer only. He does not want to have specific labels for things that we know are unaccounted for. If a figure is reported, even if it is incomplete, it will be looked at as complete. Additionally, he does not want institutions to leave out pertinent information because it did not clearly fit into a category.
- A list of all the types of awards to report will be composed.
- A campus representative asked how to report institutional fee waivers.
  - Per Darrell, the “Source” field value would be “Institutional, Internal” and the “Award Type” field value would be “Other”.
- Darrell asked if the “Loan Type” field is necessary. Consultation representatives at prior meetings noted that enough information about the type of loan can be gathered using the other fields of data in the record.
  - The consultation members concurred with removing the “Loan Type” field.
- It was proposed that loans should be identified whether they are need based or not.
- It was recommended to keep parent loans separate in the “Award Type” field because institutions are increasingly looking at affordability. To get a more accurate view of affordability, it would be good to report both student and parent loans separately because parent loans are usually excluded when evaluating affordability.
- A campus representative asked about how to classify a loan in the “Award Type” field when it fits multiple categories. For example, what if a loan is a need based, merit, parent loan?
  - The Regents will further look at the pilot definitions when compiling the new financial aid file to help provide as much clarity as possible for reporting.
- LeAnn noted that there is a need to confirm with pilot schools to specify whether merit awards are considered academic only with talent/performance awards (non-athletic) in the “other” category or merit awards include talent/performance (non-athletic).

**B. Cost of Attendance and EFC**

- Darrell asked about collecting the cost of attendance and EFC figures.
  - A campus representative introduced an idea of using direct costs for reporting.
- Darrell asked about EFC information on out-of-state students because the Regents only receive data on students who are Ohio residents.
- LeAnn shared that the Regents have to use the most current calculated EFC for the Ohio College Opportunity Grant which may differ from the EFC institutions use to make their decisions.
  - A campus representative noted that the Regents may want to collect the data that institutions use for financial aid when evaluating a student’s EFC.
- Some institutions only report EFC changes to the federal government if it affects grant eligibility.
- The pilot financial aid file had a field which asked if the student had a financial need regardless of whether or not the student actually received aid. The purpose was to know if there was a gap between cost of attendance and the student’s EFC.
  - LeAnn asked about the continued reporting of the financial need field and the consultation representatives did not object.

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- It was recommended to specify what type of cost of attendance to report. For example, a student attending one quarter will have a different cost of attendance than a student attending a full academic year.
- Darrell asked the group to consider how to include cost of attendance. Darrell would like to sit down and think about how it might look.

### **III. Tuition and Fees Data Collection**

- Darrell has been getting more information lately about tuition and fees data collection.
- It is possible that the strategic plan, which will be unveiled sometime in March, will include reference to tuition flexibility. There has been increasing discussion about using college facilities more efficiently such as on weekends and offering discounts for such use.
- Without detailed tuition and fees data collection, no one would know what is going on at institutions in relation to the policies.
- The new data collection will be central to future policies so it is not an idle exercise in data collection. The data will actually be analyzed and used.
- A concern was raised that since institutions have different fee structures, they will report differing information but the Regents will evaluate it as the same.
- It is ideal that the figures reported in the file collections match what institutions publish as their sticker price.
- A campus representative noted that there is a need for a fairly detailed list of fees to exclude from the data collection because they are not connected to instruction per the Regents' guidelines, (i.e. room and board, cafeteria, books, graduation, parking fees).
- Reporting parking fees may be complex because some institutions make all students pay a parking fee. For such instances, Darrell is unsure if the fees are included in general fees.
- Darrell thinks that the "Course-specific fees" and "Program-specific fees" categories can be combined.
  - Combining these categories may help institutions report data more consistently.
- It was asked if there should be an indicator specifying if a fee is a one time fee.
  - Darrell will consider this further.
- A campus representative asked how to report fees such as health insurance.
- It was proposed to possibly include a field to specify if the fee is mandatory or non-mandatory.
- A campus representative noted that distinguishing between fees being charged to all students and those charged to some students should not guide the new file collection.
- A campus representative asked about reporting fees specific to a certain group of students, i.e. fees that all freshmen must pay.
  - It was suggested not to include such fees because they are not applied to all students at all ranks.
- The Regents are mainly concerned with fees related to academics.
- Katie shared that the Fall Survey of Student Charges has a category where institutions report whether a fee is mandatory or non-mandatory and also if it is a one time fee or continuous fee.
- Katie acknowledged that there is a large variety of fees which sometimes make it difficult for institutions to report data consistently.
  - The Regents, with the help of the consultation group, will diligently aim to provide clear definitions and guidelines to help foster consistent reporting.

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**IV. Sources of Education and General Revenues (SR) File**

- A campus representative asked if the new file collection will include facility fees.
- Katie Hensel noted that per the Fall Survey of Charges, facility fees are fees all students have to pay for common usage buildings such as unions.
- Institutions should determine if the fee is something that all students must pay or if it depends on their activities, majors, interests, etc.
- Darrell ran a HEI Sources of Education and General Revenues (SR) query and found that for fiscal year 2006, about 96% of the fees reported were tuition and fee related and the remaining 4 % were other fees.
  - Based on the SR query results, Darrell is fine with not having a separate category for facility fees and reporting them as “other” since it is not a big item.

**V. Suggestions to consider**

- Break down the new data collections into enough detail were necessary questions are answered, do not prematurely lump the data.
- Provide clear, detailed guidelines and definitions to help foster consistent reporting.

**VI. Next steps**

- Develop a draft of financial aid file layout.
- Continue development of guidelines for the financial aid file collection.
- Darrell wants to perform further analysis of the data reported in the Sources of Education and General Revenues (SR) file. He will compose a report of his findings and share it with the consultation group.
- Compose second draft of Tuition and Fees File specifications.

**VII. Adjourned**